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THE MAGAZINE OF THE SOCIETY FOR TECHNICAL COMMUNICATION

PROJECT MANAGEMENT

EFFECTIVE PROJECT MANAGEMENT SUPPORTS CAREER GROWTH FOR TECHNICAL COMMUNICATORS

4 Learn the Language of Project Management

10 Building Strong Remote Teams

15 Putting the Communication in Project Management

18 The Intersection of Project Management and Content Strategy

24 Put Me in Coach, I Can Help Manage this (Tech Comm) Project!

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March/April 2021

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Intercom, the magazine of the Society for Technical Communication, is published to provide practical examples and applications of technical communication that will promote its readers' professional development.

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A Note from the Editor

I'M THRILLED TO introduce myself as Executive Editor of *Intercom*. It's a chance to return to my early-career roots in magazine publishing, which has turned out to be nostalgic and familiar in all the best ways during the upheaval of "these unusual times."

When it came time to choose the topic for my first issue of *Intercom*, I immediately thought of project management. While it's certainly a profession in its own right, project management skills are also a cornerstone of successful tech comm projects. I can honestly trace most of my career success to the project management skills that I learned early in my career in magazines, and went on to develop through a combination of in-house experience and business ownership.

In this issue, we're talking about the impact of project management skills on our careers. How can we use these tools to be successful, take the next professional steps, and make ourselves valuable to employers?

We have five excellent feature articles in this issue. Vivian Aschwanden talks about how learning the language of project management can enhance your tech comm toolkit; Jackie Damrau shows how she builds strong remote teams using her skills as a certified project manager; Jessie Mallory looks at how her project management experience made her an in-demand employee; Debra Kahn examines the intersections between content strategy and project management; and Bernard Aschwanden shows how project management best practices come together when building a strong tech comm team.

And of course, we can't forget our columnists.

- In "Content Technologies," Cruce Saunders echoes the theme of the issue to discuss how managing content is truly a team sport.
- Michelle Corbin's "Editing Matters" column gives us insights into how to control the chaos in our editing projects.
- And last but not least, after five years of writing "Ask a Manager," Kit Brown-Hoekstra and Cindy Currie say farewell with a final column that addresses localization and risk management—the latter being on everyone's mind after the volatility of the past year. Many thanks to both for their longtime contributions to *Intercom*.

If you have suggestions for future issues of *Intercom*, don't hesitate to contact me at intercom-editor@stc.org. I'm always looking for new ideas and new voices as we explore the opportunities and challenges in the world of technical communication.

Alisa Bonsignore
(she/her)

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Parlez-vous PM?

How Learning the Language of Project Management Can Enhance Your Tech Comm Toolkit

Equip yourself with the same tools used by project management professionals to get control of your projects and provide better value to your clients.

By VIVIAN ASCHWANDEN, PMP

LET'S START THINGS off with a quiz. Think of your current day-to-day and consider these questions:

- Do you find yourself scrambling to get it all done?
- Do new requirements and surprises inevitably make their way into the middle of your project, throwing the schedule out the window?
- Do you inherit unrealistic expectations from management along with overly optimistic schedules?
- Is your team so crunched for time and resources that you actually snort when someone asks what quality assurance processes are in place?
- Is it anyone's guess what your clients need or want, who the actual decision makers are, or even who will be using the product or the content you are creating?

If you're pursing your lips grimly and nodding along in the affirmative to any of these questions, you are not alone. I've been there, lived that—until I discovered a pathway to making my tech comm projects (and my life) less chaotic.

Still Swimming in the Same Pool

My path to enlightenment may be familiar to others.

I began as a lone technical writer in a small startup 23 years ago. Although not everything was perfect, my schedule was my own, and all the information I needed about the client, product, and user was at my fingertips.

Fast forward 10 years: I've moved on from startups and have spent several years as part of information development teams charged with documenting many products. Projects are more complex, run simultaneously, and are staffed by larger teams with (slightly) bigger budgets. And the chaos and stress have grown in tandem, along with client demands. I can literally check 'yes" to every question in the quiz above.

In these environments, I was:

- Spending more and more time in Excel and various mind-mapping tools
- Sketching (and resketching) schedules and work activities for myself and my teammates and trying to figure out when we could deliver things, how many writers we needed to accomplish the work, what items we could descope to make everything fit, what risks we needed to keep an eye on, how much peer review and testing time we could fit in alongside SME reviews, etc.

At some point I realized that I was wearing the hat of project manager as much as the hat of an information developer. I also recognized that there must be better, more efficient ways to get things under control. I just didn't know which—more learning was required.

I convinced my managers to send me back to school part-time, and got myself a masters certificate in project management. It was a turning point in my career. There was so much *good stuff* that we could apply to our tech comm projects! All the project management knowledge areas I was learning about could be directly applied to our work—scope management, time management, cost

management, quality management, risk management, communication management—the list goes on. Oh, the places we could go, the plans we could create, the processes we could apply! Workshops and lunch-and-learns soon followed on managing time, risk, and quality, along with techniques for better estimating, identifying troubled projects, and overall project planning. There was so much to share, so much we could be doing differently!

Eventually I found my way out of the actual writing part of my job and began wearing a PM hat full-time on software teams within the company. The transition was easy, as the necessary skills and toolkit were the same and totally transferable—I was simply swimming in a different lane of the same pool.

Big, Beautiful Body of Knowledge

Have you found yourself in this rut before: Doing the same thing repeatedly and expecting different results? Before I attended project management training, this was my truth. Without the know-how, it's hard to break the turmoil and stress inherent in many tech comm projects. Enter the Project Management Institute (PMI). For me, PMI was the organization that opened my mind to the possibility that tech comm projects, heck *any* project, could have different results.

PMI, like STC, is a leading membership association. It supports and advocates for the project management profession. They set professional standards, conduct research, provide access to information and resources,

and provide networking opportunities. They also have *The Project Management Body of Knowledge (PMBOK).*

First written in 1983, the PMBOK is composed by PMI volunteers and industry leaders and reflects the most current industry knowledge and practices for the profession. For those studying to become a certified project management professional (PMP), it is their sacred writ. It's where I first heard of the five PM processes and 10 PM knowledge areas (see Bernard Aschwanden's article, "Put Me in, Coach, I Can Help Manage This 'Tech Comm' Project!" in this issue for details), and where I first saw the possibilities for improving the lives of technical communicators and the satisfaction level of their stakeholders and clients.

Hindsight is Always 20/20

In retrospect, if I knew then what I know now, perhaps I would not have considered the hours I spent scheduling the team's work activities to be a *distraction* from my "real work." Instead, maybe I would have taken my schedule to management, and more convincingly expressed our need for additional people the following quarter because I had done some resource forecasting against it.

Or perhaps I would have put more time into:

- Gathering lessons learned with the team (so we could bring challenges to management and find solutions which would make our lives easier—like developing processes to create more efficiencies and allow more time for quality assurance activities)
- Working with the PM during the planning phase (instead of just inheriting a schedule)
- Learning project management tools (to not only help my own projects, but to better support the bigger project I was a part of and contribute more value).

In hindsight, I wish I had spent less time with my nose to the page, and more time looking up at the bigger project picture.

It All Comes Down to Value

The planning you do for your own work is very likely what the PM is doing for the entire project.

- Agreeing on what is needed, then figuring out what must be done to satisfy those needs
- Creating the parts of the plan needed to ensure success (determine budget, scope, schedule, risks, best ways to communicate with stakeholders, who the resources are that will work on the project, what will be done to assure quality, etc)
- Managing the "doing" of the work: monitoring it, controlling changes to it, ensuring appropriate support is provided, following processes, and communicating progress
- Delivering the finished work, getting sign-off, and reviewing lessons-learned so you can do better next time.

There is a reason why PMs follow the same best practices, similarly structure their projects, move through the same project phases, and create and apply plans from the same knowledge areas. When done well, it works. And this is where client value comes in.

Clients value project deliverables that:

- Stay within budget
- Deliver on time
- Fulfill their requirements
- Work as expected without bugs or surprises

These value measures for clients should sound familiar—they are the same things that form the foundation of a good project plan. Controls and plans for budget, time, scope, and quality are key factors in successful project plans. If you do nothing else, make these the key factors in your own project plans, and find ways to build value into your deliverables.

Controls and plans for budget, time, scope, and quality are key factors in successful project plans.

Every Project is a Content Project

In recent years, I have come full circle in many ways, finding myself managing projects at a company whose lifeblood is content. Here, all our projects focus on solving content challenges. Whether it's improving a client's productivity and performance through content transformation; improving the usability, accessibility, readability of client content; developing and applying content and reuse strategies; training clients how to write better; or rolling out a CCMS or publishing system, we do it all. Bliss! Finally, a place to merge my tech comm background with my project management interests and training.

I have found that no matter what type of project I manage or its size, the same project management principles apply. And no matter who the client is, they value the same thing. Only now, every project is a content project.

Recognizing Value

In the marketing collateral, information packages, and proposals my company provides to potential clients, we tell customers about our project management methodology. This is information that clients value.

For example, when we say that we run our projects using Agile principles, there is an implication about how we plan, structure, and execute our projects. And I

can tell you that this type of admission has proven to be an important differentiator when competing for client work. Clients are keenly interested in how a project is run, in how it is planned and executed. They want to understand what communications might look like, what type of meeting cadence to expect, how much upfront planning to expect, how expanded scope or change in requirements might be handled. These are not minor details for some clients—they form a big part in their decision-making process when selecting a vendor. They understand that good project management is necessary for success.

Take it to heart that clients pay attention to how projects are managed, no matter the size or scale. Consider this the next time you begin a new assignment, and what you can contribute to the overall project towards delivering client value.

Everything's a Project (When You're Part of the Team)

According to PMI.org, the definition of a project is temporary work that is unique in nature, with "a defined beginning and end in time, and therefore defined in scope and resources." This definition most certainly applies to many tech comm activities: they have scheduled start and end times, scope, resources, and are usually unique. They are actual projects. And you should treat them with the same planning care as a PM does for the encompassing project you are a part of.

By approaching your tech comm assignments as "projects" and applying proven project management techniques to them, you can gain better control of your team's work and provide better value to your clients.

Take it to heart that clients pay attention to how projects are managed, no matter the size or scale.

Take Action Now

If you are happy in your current role as a tech comm wizard, and the time, inclination, or opportunity is not there to immerse yourself in the world of project management, there are still things you can do now to make your life, and the lives of your team members, better when it comes to project work.

- Get to know your project manager. Many subscribe to the role of servant leadership, and truly want to work with you to help you and your team succeed. They are here to help you; they *want* to help you. That is their job.
- Find ways to insert your plans into the larger project plan. Don't quietly accept a plan from someone else if you've not been invited to provide input into it.
- Find out what your PM needs for their plans—what risks should they know about that could upset the overall project plan? What resource, skill, or tool gaps have you identified which they help find solutions to? What support do you need to improve the quality of your deliverables? Provide your PM the details they need to plan better, set more realistic expectations with the customer, and set you (and the whole team) up for success.

If you can, start now to learn about project management best practices and principles which you can apply to your tech comm projects. With the right tools and language, you can not only get the help you need from your PM, but you can apply their insights to your own projects. In doing so, you can address and mitigate many of your project challenges and start creating client value.

VIVIAN ASCHWANDEN, *PMP (vivian@precisioncontent.com) is a Senior Program Manager and Director of PMO at Precision Content Authoring Solutions, Inc. She began her career as a technical writer over 20 years ago and started her move into project management in 2009. She has worked for a variety of companies over this time, from small startups to large multinational corporations, and is elated to have finally found her tribe. When not tending to the needs of her Irish wolfhound or goldendoodle, you can find her working from her home in Algoma Mills, Ontario, Canada.*

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How Project Management Skills Helped Me Build Strong Remote Teams

By DR. JACKIE DAMRAU | *STC Fellow*

TECHNICAL COMMUNICATION SPANS into many different job titles and industries, doing many things one would have never thought we'd be doing—at least not when I started in technical communication. The best attributes that a technical communicator possesses are those of attention to detail, knowing how to provide the right information to the right audience in the right media, and the ability to gather information. It's not hard to see why a project management role would be a natural progression for technical communicators.

The skills that I developed as a project manager helped me to build strong remote teams—a skill that has become business-critical during the pandemic. With companies announcing plans for long-term remote working arrangements, project management and remote team building will be essential skills for the future.

In this article, I'll share a bit about my career progression (yes, it's changed many times over the years) and how I adapted to that of project manager, scrum master, and Kanban delivery manager. First, let's explore the roles themselves, and what sets each one apart.

Types of Project Managers and Certifications Needed

Project Manager

A **project manager**, according to the Project Management Institute (PMI), is a person that is "organized, passionate and goal-oriented, who understand[s] what projects have in common, and their strategic role in how organizations succeed, learn, and change." They are change agents, people who are comfortable with adaptation and complexity in dynamic environments. To achieve their goals, they cultivate people skills, and have a broad and flexible toolkit of techniques. Project managers often "become **program managers** (responsible for multiple related projects) or **portfolio managers** (responsible for selection, prioritization, and alignment of projects and programs with an organization's strategy) (Project Management Institute, "Who Are Project Managers?").

Project managers use tools like Microsoft Project, Smartsheet, or Excel to maintain a schedule of the project and its deliverables. This schedule is what keeps the project—whether agile, waterfall, or hybrid "wagile"—on track and is one of the key communication deliverables to senior leadership or the project owner.

Project managers often have a PMI certification in one of the following:

- Project Management Professional (PMP)
- Certified Associate in Project Management (CAPM)
- Portfolio Management Professional (PfMP)
- Program Management Professional (PgMP)
- Disciplined Agile Scrum Master (DASM)
- Disciplined Agile Senior Scrum Master (DASSM)
- Disciplined Agile Coach (DAC)
- PMI Agile Certified Practitioner (PMI-ACP)

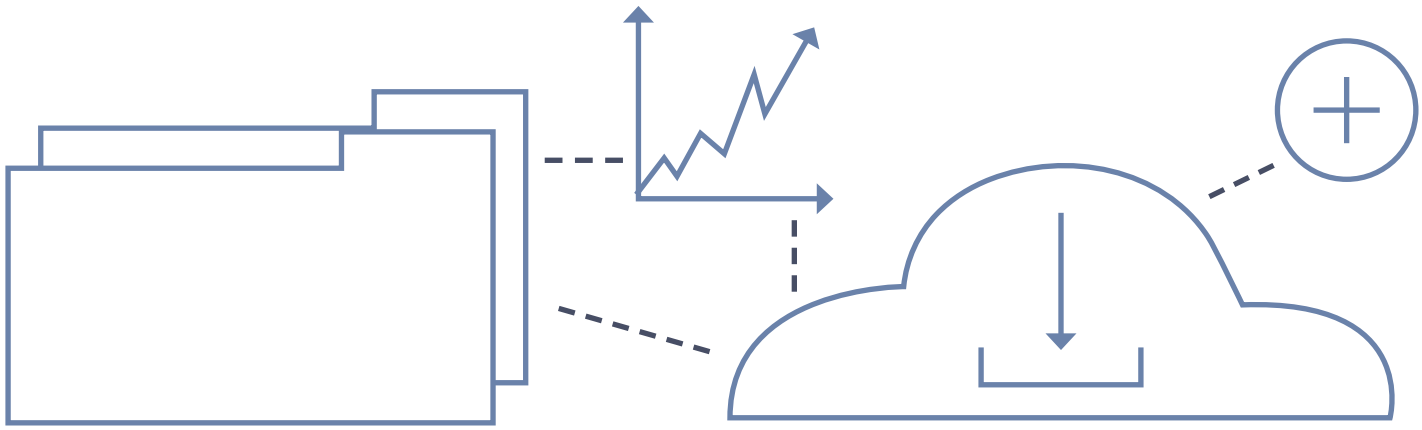
Check out the PMI website at www.pmi.org/certifications for additional information about the similarities and differences among the certifications.

Scrum Master

A **scrum master** is another type of project management role. I consider it in the same realm because in many ways your responsibilities are like what a project manager does.

According to the Agile Alliance, a scrum master is "responsible for ensuring the team lives agile values and principles and follows the processes and practices that the team agreed they would use. The responsibilities include: clearing obstacles, establishing an environment where the team can be effective, addressing team dynamics, ensuring a good relationship between the team and product owner as well as others outside the team, and protecting the team from outside interruptions and distractions" (Agile Alliance Glossary).

The definition that Scrum.org gives is that a scrum master is a servant leader that has a "holistic approach to work, shared decision-making power, promotes a sense of community, and [provides] service to others" (Scrum Alliance, "What is a Scrum Master?").



Commonly used tools that a scrum master uses include Microsoft Team Foundation Server (TFS), Atlassian Jira, Smartsheet, and Excel, though there are a multitude of others tools out there for use.

Scrum masters, like project managers, also have certifications that demonstrate their knowledge of the key agile principles. Certifications are available from two organizations: Scrum Alliance and Scrum.org.

- Scrum Alliance
  - CSM: Certified ScrumMaster
  - A-CSM: Advanced Certification ScrumMaster
  - CSP-SM: Certified Scrum Professional ScrumMaster
  - CAL: Certified Agile Leadership
- Scrum.org
  - PSM: Professional Scrum Master
  - PSM II: Professional Scrum Master II
  - PSK I: Professional Scrum with Kanban

Kanban Service Delivery Manager

In *Essential Kanban Condensed,* David Anderson and Andy Carmichael define a service delivery manager as a person "responsible for the flow of work in delivering selected items to customers and for facilitating the Kanban Meeting and Delivery Planning" (p. 33).

The tools used are the same as those for scrum masters, yet the boards are used in different contexts. A Kanban team does not do sprinting as an agile team does. (A "sprint" is a short, time-boxed period that a team sets to complete a certain amount of work. The duration of a sprint is usually two or three weeks.)

Kanban certifications can be obtained through Kanban University (www.kanban.university/#certifiedkanban):

- KMP: Kanban Management Professional
- KMP-I: Kanban System Design

My Path from Technical Communication Through Project Management

Now that you know the various roles, I'll talk about my path from traditional communications to project management.

My Career Progression

My career started as a technical communicator back in the days of word processing, typesetting, etc. I loved typing and no matter what I typed (of other people's content), I valiantly edited bad grammar, followed style guides, and produced an admirable product to meet regulatory and/or company guidelines.

My career then moved from technical writing into instructional design; my résumé includes technical and soft skills course development as well as a short run as a software trainer. From that avenue, I jumped into the business analyst role where I've spent the last 15 years of my career. I sought my project management certifications during this period.

The skills that I learned as a scrum master, Kanban delivery master, and project manager are versatile and transferrable to any role.

The skills that I learned as a scrum master, Kanban delivery master, and project manager are versatile and transferrable to any role.

Keeping Remote Teams Engaged and On Track

Since 2004, I have worked mostly with virtual teams on various projects from business process modeling or requirements gathering; to a reporting structure (leadership positioned in company's headquarters in one state, with me positioned at a corporate regional office in another state); to a scrum master where all my teams were geographically distributed across multiple time zones and continents. Traversing the time zone challenge alone is interesting, yet possible!

Project management now encompasses both on- and off-shore team members. Business is done much differently, yet the concepts for working with distributed teams does not change. Here are a few of the tips and tricks that I have learned through the years in these varying roles.

- Determine what type of team you have (Messer)
  - **Co-located:** A team where all members are in the *same* office *and* in the *same* time zone
  - **Similar time-zone:** A team where members are in *different* offices *and* in more than one time zone, such as U.S.-only teams spread across four time zones
  - **Fully distributed:** A team where all members are geographically dispersed *and* in multiple time zones, often with a difference of eight hours or more
- Determine how you will handle the common distributed team challenges (ezTalks, Stepanov)
  - **Time Zone Differences:** This requires embracing a "we" rather than an "us versus them" mindset when working, for example, with team members who may be in London, England and near the end of their day when those of us in the Central Time Zone (CT) of the United States are just starting our day. We have a limited number of hours (7–11 a.m. CT) in which to conduct business. Asking this group to stay after hours may pose problems as they may

experience transportation issues reaching their home.

Here you might want to consider rotating meeting times, if possible, or meeting fewer times a week to accommodate geographic regions. With my scrum teams, I would need to call upon the individuals during our daily standup meeting; I found that this helped to build engagement and give voice to people who couldn't be seen through the phone. One day I'd go A–Z, then the next day I'd do Z–A to ensure that those at the end of the alphabet were given equal attention.

- **Team Rapport Building:** Building team rapport with virtual team members that you might see occasionally through a webcam session or through professional photographs shared on the company's intranet directory requires skill. The skill is in being familiar with the different cultures on your team: some cultures will talk openly about themselves; others prefer not to. However, if you can break the ice with everyone, you'll have a more cohesive team to work with.

  My tips for team rapport building include:
  - **New Team/New Members:** Reserve the first 5-10 mins for team member introductions to share about themselves (one personal/fun fact about themselves).
  - **During scrum events:** Open each meeting with time for everyone to share something about their weekend plans, what they did on the weekend, or an interesting trip they may have completed.
  - Engage, engage, engage!
- **Cultural Collaboration Differences:** As mentioned in Team Rapport Building, one should research and understand the different cultures of your team members, even down to country holidays. Another tip is to ask team members to share about their cultures whenever they mention they'll be out of office for a specific holiday. It can be an ice breaker to have a less-talkative team member talk about something they know. Finally, building rapport comes with making sure that everyone feels valued and respected with a safe environment to share what they choose to share.
- Determine the communication tools to use (Ambler; ezTalks)
  - **Agile Lifecycle Management:** Jira, TFS
  - **Group Chat:** Microsoft Teams, Yammer, Slack, Skype for Business
  - **Documentation:** Microsoft Teams, Confluence wikis, SharePoint wikis, GitHub, TFS
  - **Video Chat:** Zoom, WebEx, Skype for Business

Conclusion

Whatever your career goals, project management certifications can help you to build a foundation of much-needed skills that help with maximizing the effectiveness of remote teams. I encourage you to do your own research, consider getting a certification (if applicable), and always looking to expand your knowledge in this or another profession.

Professional Associations

Project Management Institute: www.pmi.org

Scrum: www.scrum.org

Scrum Alliance: www.scrumalliance.org

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Technical Communication: Putting the Communication in Project Management

By JESSIE MALLORY

THE DEMAND FOR technical writers is growing. According to the U.S. Bureau of Labor Statistics, the next 10 years will see faster-than-average growth for those in the technical communication field. This puts writers in an enviable position. However, you may be in an even better position than you realize. The skillset demanded of technical writers is one that can bolster careers outside the technical communication field—think business analyst, product manager, scrum master. For the sake of this article, we're going to focus on the advantages a technical writing background brings to a career in project management.

While the day-to-day tasks of a technical writer and project manager can look very different, both are focused on communicating and doing it skillfully. Not only do these skills help to build your career, but they make you more attractive to employers.

Many technical writers are already project managers without the title. You initiate projects, create documentation, anticipate risks, manage versions and translations, identify and work with stakeholders—and do it all against a deadline.

The processes associated with project management study are often broken into knowledge areas. These are the concepts and activities accompanying a field or area of specialization. Processes from many of these knowledge areas are applied each time you work on a project. The documentation and interrogative skills of a technical writer lend themselves especially well to some of these knowledge areas, specifically integration, stakeholder, scope, time, and communication management.

Integration Management

In project management, integration represents the identification and unification of processes and activities to meet project requirements. Integration work spans the entire life of a project. At project inception, project managers define why the project exists and create the project management plan, which describes how the project will be carried out and monitored. During the life of the project, the project manager uses integration processes to help direct the work being done, compare that work against what is expected, and track any changes made. At the end of the project, the project manager ensures that the project has met its objectives and can be closed.

As you might guess, the integration processes require a lot of documentation. Before the project is even started, a charter must be drafted and approved. Then there is the massive task of pulling together and documenting all the pieces of the project management plan. The project management plan is the document that describes how different parts of the project like communications and scope will be addressed. The project management plan and the charter must be accurate and consistent as they set project goals and boundaries and are used to measure whether a project is on track.

Someone with a communications background brings added experience that's beneficial to business. We can easily understand the implications of not involving technical writers early enough in a project. Writers who are working alongside a project as it progresses have the benefit of understanding the product or deliverable from its initiation. This means they need much less ramp-up than if pulled in at the end of a project. There are also the day-to-day benefits of having a writer around. Writers can edit content on the go, ensure consistency, craft clear user messages, and perhaps reduce the rounds of translations needed. This can reduce project costs for businesses, and have a positive impact on the bottom line.

Stakeholder Management

Stakeholders are similar to a document's audience. A stakeholder is anyone who can impact or is impacted by a project. This can be a broad group of people depending on the project, product, or organization. Stakeholder management consists of identifying the stakeholders, planning how to engage them based on their interests and project impact, and monitoring and communicating with those stakeholders throughout the life of the project.

Stakeholder satisfaction is always a key project objective. To meet this goal, the project manager is responsible for first learning more about the stakeholders. This means identifying the people or groups who could be affected by decisions or outcomes of the project. Stakeholder management then requires the extra step of understanding the influence, level of involvement, and interdependencies between stakeholders. The ability to quickly identify and effectively address the key stakeholders' needs can streamline the process and improve overall business efficiency.

This learning phase is an easy shift for a technical communicator who is already experienced in identifying an audience's needs and interests. The project manager documents these stakeholder requirements as part of the project management plan.

A more difficult move for a technical writer may be the monitoring and controlling of stakeholder engagement. Though this particular task isn't necessarily an easy transition, it's not far removed from the technical writing skill set. Technical writers are constantly engaging with their subject matter experts.

Scope Management

Project scope management is ensuring that the work required, and only the work required, is part of the project. A large part of managing scope is collecting requirements and clarifying what is or isn't in scope. This involves creating a work breakdown structure

(WBS), which is an itemization of the work to be completed. The WBS is a sub-component of the project management plan.

The WBS is another illustration of how beneficial technical writing skills can be to a project manager. Getting it right requires an in-depth understanding of processes and deliverables. This is achieved through effective conversations and rigorous questioning. These are skills that technical writers have in spades.

Writers are constantly working hand-in-hand with their teams and stakeholders to understand the product and ensure their documentation is both correct and complete. Effective documentation supports users, reduces service calls, and reduces overall costs for the organization.

Time Management

Time management is an incredibly important part of project management. It includes defining and sequencing of activities based on requirements and the relationships between work items. It's the clarification of activity resource requirements and how resource availability will affect activity durations or sequencing. It's then developing a comprehensive schedule that takes all of this information into account and abiding by that schedule to ensure a timely completion.

As writers, we often have to manage our own documentation projects, whether working in a team or alone. Technical communicators are very capable of asking questions to learn the ins and outs of a process, product, team, or deliverable. Effective questioning skills make technical communicators especially skilled at discovering the activities that must be accounted for in a schedule and very adept at discussing status with their teams. A writer's ability to dig into an issue and learn its cause or consequence is beneficial when learning more about risks that could impact the project schedule. Communicators are often able to hit the ground running, reducing the learning curve to deliver business-critical outcomes.

Communications Management

The majority of a good project manager's time is spent communicating. Projects are a mountain of information coming in and needing to go out. At the beginning of a project, the project manager creates the communication plan. This is another sub-component of the project management plan. The communication plan details types of communications, audience, sender, frequency, and sometimes where important information will be stored. It is an essential part of managing efficient and effective communications. Communications are designed according to the needs of the stakeholders. Once the up-front planning is complete and stakeholder requirements are understood, the project manager spends their days communicating with the various stakeholders.

It's easy to see how a technical writer could excel at the written side of project communications. Developing a communication plan or crafting the perfect email to sum up the status of a project will come easily to any technical writer. But a technical communication background offers so much more than just writing ability. To stay current with a product or project, writers are constantly communicating with their team members, asking questions and developing relationships. Similar to project managers, writers often work across teams, roles, and levels in an organization. This comfort with written or in-person communication, regardless of team boundaries or hierarchies, is a huge benefit to a writer-turned-project manager, and the businesses who hire them.

Similar to project managers, writers often work across teams, roles, and levels in an organization.

Opportunities Await

Few careers progress in a straight line. Instead, they're a map of the turns and reroutes we've taken as our positions change. Happily, the skillset of a technical writer is one that can be advantageous in several other fields.

Project management requires a prodigious amount of communication and documentation: plans, charters, models, emails, meetings, etc. A technical communication background is a boon to anyone interested in a career in project management. This is great news for technical writers as it opens opportunities in another career path that's growing just as quickly as technical communication.

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We Are Not Alone: The Intersection of Project Management and Content Strategy

By DEBRA KAHN | *STC Senior Member*

PRACTITIONERS OF CONTENT STRATEGY do not have to go it alone when developing a strategy for a content project. Whether we are leading a digital transformation of existing content or the launch of a new website, we can learn much from our project management colleagues.

In this publication nearly eight years ago, Scott Abel defined the role of a content strategist as "concerned with the actions, resources, costs, opportunities, threats, and timetables associated with producing content" that meet an organization's business goals and support its overall vision.

That list of elements should ring familiar to project managers.

The Project Management Institute (PMI), an international association for project, program, and portfolio managers, states that project managers "have a broad and flexible toolkit of techniques, resolving complex, interdependent activities into tasks and sub-tasks that are documented, monitored, and controlled. They adapt their approach to the context and constraints of each project …"

That flexible toolkit and adaptable approach should ring familiar to content strategists.

While our tools and techniques might have evolved since 2013, we content strategists can find value in looking closely at the basic principles of project management.

Align with the Business Need

A Guide to the Project Management Body of Knowledge (*PMBoK*), the bible for project managers, states that "projects are initiated due to internal business needs or external influences." Determining whether the business needs a fixed-scope *project* or a continuous improvement *program* is an important first step.

Based on the needs analysis, project leadership typically develops a business case and charters a project. These steps occur whether the project team uses the traditional *waterfall* (or phased) project methodology or a more iterative, *agile* project methodology. With the latter, the charter might evolve over time.

Similarly, successful content strategists tie their effort closely to a defined set of business needs. Generally, I've seen three categories of business needs drive a content project:

- Acquire more customers by repositioning existing products and services
- Improve customer satisfaction and/or business efficiencies to lower costs
- Offer new products or services

In ideal circumstances, the business needs driving the content strategy fall into only one category. But that is not always the case, especially in technology businesses. The key is to carefully tease out and state how a content strategy will meet the business needs.

For example, the fictional "Acme High Technology" might have the following stated business goal:

> Acme High Technology will realize process efficiencies and cost savings, while maintaining current customer satisfaction levels, by integrating all data center systems into a standardized and automated service infrastructure that is managed through a global service portal.

The goal or charter of the content strategy might be stated this way:

> To realize operational cost savings and efficiencies for the business, the service portal content and interfaces will guide data center technical and operations staff to quickly and accurately assess, effectively monitor, and efficiently respond to customer satisfaction issues in the data center, as well as enable the staff to efficiently and safely integrate, maintain, and troubleshoot systems in the new, standardized and automated service infrastructure.

Notice that the language of the content strategy goal does the following:

- Echoes the overarching business goal
- Identifies the audience
- Indicates the scope of the content project
- Encompasses user requirements
- Sets some standards for the quality of the work

These elements help to define and bound the content project, just as they would any other development project. I'll provide more information on them later in this article.

The key is to carefully tease out and state how a content strategy will meet the business needs.

Engage Stakeholders

The statement of a business goal should reflect an understanding of the project's or the strategy's stakeholders. The first step, always, is to identify the stakeholders — from the customer to the CIO and all the potential influencers in-between — as well as their expectations and level of influence on the project.

The *PMBoK* reminds us that stakeholders can see various types of "business value" in a project — both tangible and intangible. Tangible examples include monetary assets, market share, and tools. Intangible examples include brand recognition, reputation, and public benefit. Various project management *data representation techniques* offer additional ways to capture an understanding of a project's stakeholders.

After you have an understanding of your stakeholders, frequent stakeholder communication becomes important. In her book, *The Content Strategy Toolkit*, Meghan Casey says "The first key to getting stakeholders on board and aligned is to have empathy for where they are starting from. The second is to bring them along for the journey …"

The *PMBoK* outlines techniques for planning, managing, and monitoring stakeholder engagement. I like to do an assessment from time to time, beyond the regular meetings and updates. One assessment tool offered in the *PMBoK* involves some emotional intelligence and a scorecard: the stakeholder engagement assessment matrix.

In this system, a "C" indicates the *current* level of engagement of the stakeholder, and D indicates the *desired* level of engagement to ensure the success of the project.

Focus on the User/Audience Needs

Long a staple of successful technical communication, the directive to "know your audience" and to design your content accordingly forms the foundation of content strategy. This directive also intersects with the project manager's challenge to define and prioritize end-user requirements for project deliverables.

The *PMBoK* defines project and product requirements similarly: the "conditions or capabilities that are required to be present in a product, service, or result to satisfy an agreement or formally imposed specification." It advises that a requirements record have enough detail to determine a *baseline* state against which progress can be measured. Many software tools are available for recording and tracking requirements.

The content strategist's tool kit for recording audience discovery and requirements includes user personas or profiles, and task analysis. Inputs to these deliverables include demographic research, surveys, in-person interviews, site visits, and workplace observations.

In my 2020 blog post, "Tips for Developing a 'Real' User Profile for a Content Strategy," I outline five steps I have followed to develop a set of relatable user profiles:

1. Research the basic job-related tasks and backgrounds of all potential audience types
2. Gather interview questions and contact information for audience interview candidates
3. Conduct and record face-to-face interviews with target audience members
4. Develop reasonably detailed "real" user profiles for the content development team
5. Provide context to the team for those profiles

With these steps, I have been able to move beyond the generic user personas that are typical of marketing content strategy. For example, referring to the earlier content strategy goal statement, I would leverage these steps to profile representatives of the various technical and operations staff positions, including managers, working in the business's data centers.

Scope the Work

Scoping is an exercise in "getting real" about goals and objectives. What is doable and what is "nice to have?"

To focus the effort, both the project manager and the content strategist typically compare the future state against the current state and perform a *gap analysis*. This step is particularly necessary if the deliverable is a new version of an existing product or content set.

For a traditional project, the project manager assesses the gap between the requirements gathered and the *critical path* to the stated business goals; then the project manager "progressively" manages the project to that scope. For an agile project, the project manager

continually assesses the gap between what has been accomplished so far and what remains to be done or the *backlog;* thus the project scope evolves over time.

A *content audit* or a *content inventory* are a content strategist's primary tools to perform a gap analysis. Both can help to scope the work and serve as a reference during development.

What is the difference between the two?

In their seminal book *Managing Enterprise Content: A Unified Content Strategy (Second Edition)*, Ann Rockley and Charles Cooper tell us that a content audit is *qualitative*: the "process of actually looking at the content and assessing its value and opportunities for reuse."

The content inventory, according to Kristina Halvorson and Melissa Rach *in Content Strategy for the Web*, is more *quantitative*. It provides "just the facts," focusing more on listing content and its use and/or location.

Stakeholder	Unaware	Resistant	Neutral	Supportive	Leading
Stakeholder 1	C			D	
Stakeholder 2		C		D	
Stakeholder 3				D-C	

Table 1. The stakeholder engagement assessment matrix

However you identify and document the scope of the content project, ensure that your strategy goal statement or summary clearly defines the boundaries of the content development effort. For example, our earlier content strategy goal statement states that the content work encompasses service portal content and interfaces, but only so far as they "guide" and "enable" specific work requirements for the identified audiences.

... ensure that your strategy goal statement or summary clearly defines the boundaries of the content development effort.

Develop the Work Plan and Schedule

The outcome of the gap analysis effort is a work plan or workflow for the development project, which is designed to fill the gaps. But that is not as easy as it sounds.

You'll often hear project managers speak of the *triple constraints* of schedule (time), cost (money and resources), and quality (scope creep). In other words, the work plan often encompasses compromises. That's something we content strategists should bear in mind, too.

Project managers consider these constraints when developing the work breakdown structure or WBS, "a hierarchical decomposition of the total scope of work to be carried out by the project team to accomplish the project objectives and create the required deliverables," according to the *PMBoK*. The WBS often gets input into a *Gantt chart* or other scheduling tool. The agile project manager considers cost and quality when developing a *sprint*.

Content strategists might not be directly involved in a work plan and schedule. But as Rahel Anne Bailie says in her 2013 *Intercom* article "A Methodology for Content Strategy," the step *after* requirements gathering and scoping—the step she calls "interpretation—is "where the magic happens…where all the puzzle pieces fit together."

When working on this type of interpretation for a content project, I like to ask the following questions:

1. What type of content best meets the audience's needs? (For example, DITA gives us the archetypes of task, concept, and reference.)
2. What level of detail is needed?
3. How best can the content be conveyed to the audience? (For example, table, illustration, video, help file, FAQ, chatbot?)
4. How should differences among audiences be accommodated?
5. How should the content be categorized? How can it be reused? And how is metadata applied?
6. How does the content leverage or expand existing infrastructure? (For example, an existing information model? An existing reuse strategy?)

As you translate your interpretation into a work plan, workflow, or schedule, remember that content requires not only a development cycle but also some kind of governance of its life after it is published. How much maintenance will the content require in the future? How long a life will the content have?

Manage/Test Plan Components

As the development work progresses, project leadership becomes more of a support role. For both the project manager and the content strategist, this project phase typically includes these three types of activities:

- Helping the developers keep the big picture in mind while contributing to forward progress
- Overseeing proofs of concept (POCs) and other conceptualization and testing efforts
- Ensuring that the developers have the resources required to produce quality work efficiently

In the *PMBoK*, the first activity listed for this "manage and direct" phase is to "manage project knowledge." It defines this activity as "the process of using existing knowledge and creating new knowledge to achieve the project's objectives and contribute to organizational learning." Outputs include process updates and a refined project plan.

Plan refinement is also part of the content strategist's role. We might consider adding project management tools such as a *risk register* and a *lessons learned register*, which can be shared with management and other stakeholders.

Which brings me to the role of the *POC* in content strategy. *Wireframes* are great for content design and conceptualization, especially when a new, very different approach is being trial-ballooned. You can use wireframes to gather quick feedback from potential audiences.

But, in my experience, content developers need to test-drive a new approach, especially if it requires them to develop a different kind of content than they have previously. An example is troubleshooting content. The development team needs to understand what constitutes "good content" and find out where challenges might lie.

Asking a content developer or two to run trial content through a new or evolved template, process, or output target can reveal potentialities—good and bad—that no one thought of during the design phase. As a result of this proof of concept, templates and other job aids—such as process descriptions, scripts, style sheets, and tagging guides—can be improved before the new approach is rolled out to the entire development team. This rollout can be followed up with check-ins or interim reviews.

Monitor/Measure the Project's Success

Interim reviews are part of the team's monitoring and measuring effort, a set of processes that can also include oversight of and adjustments to the quality of the deliverables.

The *PMBoK* refers to "controlling" and "regulating" a project with these processes. It speaks of *change requests* and *corrective and preventative actions*. Those process steps might be too formal or cumbersome for a content development staff, but some kind of feedback process is helpful.

In my corporate job as a content strategist, I also wore an editor's hat. I supported the team by providing developmental edits of initial efforts—applying standards that I had developed or maintained: style guides, style sheets, specialized templates, and terminology lists. The benefit of having dual roles was that I was able to observe—and learn from—how the content development team was implementing the content plan.

In that corporate position, I also implemented and applied learnings from a content quality measurement system. Leveraging concepts from Megan Gilhooly's presentation "Customer-First Content: The Content Quality Flywheel," from the 2018 *Content Management Strategies/DITA North American Conference*, I designed a system with three parts:

- Website metrics to measure visitor data and behavior
- Reviews of website comments and visitor surveys to assess user perceptions of the content
- Periodic internal reviews to assess content quality against team standards

A project manager's measurement toolbox includes everything from periodic budget reports to work progress dashboards and can include sophisticated forecasting tools. PMI offers tool templates through its projectmangement.com website. Many content strategists use these or similar tools as part of a project communication strategy, especially on large content projects. The data gleaned from these tools can also be used to make course corrections or to justify project scope changes.

Another benefit of having a set of measurement tools is to celebrate successes. I believe that small successes should be celebrated regularly, and not only at the project close. I love that the "Consider These Servant Leader Responsibilities" section of the *PMBoK* advises us to "Create upward spirals of appreciation and good will." Let's enjoy those spirals.

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Put Me In, Coach, I Can Help Manage this (Tech Comm) Project!

Leveraging for Success

By BERNARD ASCHWANDEN | *STC Associate Fellow*

TEAMWORK AND SPORTS: The analogies can be endless. Athletes count on teammates to know what needs to be done, what each player brings to the field, and how to make the most of each other's skills and abilities to achieve shared success. It's always easier to succeed when you see someone doing things right, and you adapt it to improve your own game.

Content is the same. Writers, engineers, illustrators, translators, and managers work together to achieve a shared goal. When technical communicators know what others do (and how they do it) we can apply their best practices to our approach to the game. Everyone wins!

Technical communicators should leverage project management best practices. We can learn the project game from those who play it best; then apply it to what we do every day. Let's take a few cues from the project management playbook and apply their "Knowledge Areas" to technical communications.

Project Management Best Practices

The *Project Management Body of Knowledge (PMBOK)* identifies 10 Knowledge Areas that lead to success in project management. Included is the management of integration, scope, time, cost, quality, human resources, communications, risk, procurement, and stakeholders. It sounds like a lot to manage for one project, but success or failure can hinge on any one of these areas. *The good news is, you're probably already managing much of this in your own tech comm projects, even if you don't realize it.* Check out Vivian Aschwanden's article "Parlez-vous PM? How Learning the Language of Project Management Can Enhance Your Tech Comm Toolkit" (page **4**) to learn how every project is a content project.

Let's explore these Knowledge Areas individually, examine how they might relate to us in tech comm, and learn how best to manage them to realize greater success in our own projects.

Integration Management

Integration management deals with handling the day-to-day choices that arise in a project, determining where to place resources and effort, and identifying and addressing issues as they arise. As a technical communicator, you'll achieve successful integration management when you can pull together all the activities surrounding your documentation project (especially the activities laid out in these Knowledge Areas) and keep the project moving forward. A great way to visualize this is to imagine a juggler keeping multiple balls in the air. Each ball must be coordinated with respect to the other balls so that the whole presentation can continue smoothly.

Scope Management

The scope is everything included in the project and—importantly—nothing that isn't. For good scope management, it's critical not only to define the boundaries of the project, but to protect those boundaries in order to keep the project on track. Documentation projects should have clearly defined requirements that we can build the scope from, determining what is and isn't included. For any project, scope is an important element to agree upon early—and in writing—to avoid scope creep later in the project. Consider a documentation outline to create a framework for the content that goes into a manual. Once broad agreement is reached, you can avoid revisiting changes when someone—often days, weeks, or months later—says "you didn't include a chapter on hardware upgrades." You can point back to the plan to identify what was in scope, request more budget if it's a necessary addition, defer if it's not crucial, or adjust in some cooperative way.

Time Management

Time management keeps the project on schedule for on-time delivery. For documentation projects, this could include identifying the activities to accomplish, sequencing them, determining required resources, estimating time requirements, and scheduling the activities. Success comes from planning an appropriate timeline that anticipates the impacts of the varying time zones and workdays of your global team, foreign and domestic holidays, training needs, and other factors.

It's worth noting that building an appropriate timeline can only be accomplished once other areas of the project—such as scope and procurement management—have been clearly defined. Even then, it's always good to keep in mind one of the oh-so-humorous (yet somehow frustratingly accurate), broadly used, and never attributed *Laws of Project Management*: "A carelessly planned project will take three times longer to complete than expected; a carefully planned project will only take twice as long."

Many project managers joke: "A carelessly planned project will take three times longer to complete than expected; a carefully planned project will only take twice as long."

Cost Management

How can you complete the project within the approved budget? With cost management. effective cost management starts with estimating expenses, establishing a budget, and controlling expenses throughout the project. Remember, costs are not just money, but hours, resources, and other things with a finite availability. However, as most of us know, managing costs is rarely clear cut. Sometimes we estimate costs right from the start that exceed our approved budget, forcing us to make tough decisions. Sometimes external factors or unexpected developments impact costs along the project timeline. For documentation projects specifically, we must determine how our approved budget will work across all aspects of the project, such as lifecycle costs and ongoing tech support expenses. We must also anticipate the places where our project might experience variances. Are we working with a risky client who is known to change scope mid-project? Are we limiting design review to stay within budget, only to realize added expense later in the form of support or revisions? Ultimately, cost management involves coordination with and consideration of most other key Knowledge Areas.

Quality Management

The primary goal of quality management is to ensure a project has met the objectives it initially set out to do. For documentation projects, this can be achieved by:

- Identifying quality standards relevant to the project
- Applying those standards consistently
- Monitoring results for compliance
- Adjusting as necessary

Quality standards can come from within an organization, from the customer, or a combination of both. Once they have been identified, they should be applied throughout the project and should be tracked and measured to monitor compliance. For example, if you have a large, long-term document conversion project, you and your customer would likely agree on a certain number of chapters to be converted every month. This goal should be worked into the project timeline, tracked, and documented. Doing so ensures that you and your customer can assess whether you are meeting your objectives and adjust as needed. Quality management is a process that should become integral to our project planning and execution. If we don't consistently set and maintain quality standards, we run the very real risk of falling short in some, if not all, of the key Knowledge Areas we're discussing today.

Human Resource Management

The humans involved with your project are a finite resource. Spearheading human resource management from the onset of a project helps to manage expectations and build trust among the team. Planning should occur early, and include:

- Identifying roles and responsibilities
- Clarifying reporting structure
- Ensuring the right people are on the team
- Providing training as needed
- Tracking performance

These are important concerns whether the project is big or small. Even if you're a "team" of one, you and your customer will still need to come to agreement on such things as roles and responsibilities, and potential training needs (which could impact both time and cost for the project). On a larger team, clarification of the reporting structure becomes critical, as does ensuring that you've got the right people available for the work ahead.

Communications Management

Communications management ensures that project information is appropriately handled with respect to the project phase, from creation to disposition and everything in between. This includes such things as

collecting, distributing, storing, and retrieving relevant project information. We often think of communications only in terms of our project deliverables, but we also need to practice good communication with our teams while we're creating. This starts with determining who the stakeholders are and what information they need. Then, we communicate regularly with those stakeholders, and we don't stop until their expectations are met. This should be an ongoing process throughout the project; it leads to fewer surprises and can reduce negative impacts such as change requests, calls for overtime, and quality complaints. Open and ongoing communications management is a key element in keeping projects on track.

Risk Management

Risk management involves identifying uncertainties or conditions that could affect your project, and taking steps to reduce their impact if they occur. To practice risk management, determine what risks might affect your project and prioritize them based on probability and potential impact. Analyze the effect they will have on the project and develop appropriate responses to mitigate that effect. Then, throughout the project, monitor these potential risks and execute your response plan(s) if necessary.

One example of risk management is allocating a certain percentage of the project's budget to cover unexpected expenses. (If you end up not needing to use those funds, congratulations, you just managed risk well enough to come in under budget. Pizza party!)

Procurement Management

Procurement management deals with the acquisition of external products or services necessary for project success. For documentation projects, this could include new software or hardware, additional training, hiring a consultant, or perhaps outsourcing some specialized work. Procurement activity will have an impact on the project's timeline and cost, so proper management is essential. It's good to have an idea of where these resources may be found. In my experience, membership in STC, and attending networking and educational events like STC's Technical Communication Summit, are a great way to build a list of resources to keep in your back pocket.

Stakeholder Management

For project management, this key Knowledge Area is of utmost importance. Stakeholder management refers to the maintenance of relationships with both internal and external stakeholders to garner and sustain support for projects. Once stakeholders are identified, they should be kept actively engaged in the project; this increases collaboration and reduces risk.

The overall success of a project will increase if more people within an organization—especially those at the executive level—buy into the project and actively engage in its progress. Consider just how relevant to your documentation work the following project management quotes are! Bob Roark, PMP, Executive Solutions Strategist for Cherwell Software in Denver, Colorado, says in *Pulse of the Profession,* 2020, "If people start understanding 'what's in it for me,' then they'll get there faster." Mr. Roark also stresses the need to communicate with stakeholders from the start, adding that "If you [communicate] behind the change, it's an uphill battle no matter what you do." Sound familiar? Get people on board by showing them how they benefit from what you do, communicate early, and increase the odds of success.

Get people on board by showing them how they benefit from what you do, communicate early, and increase the odds of success.

Certification

Aside from the wealth of knowledge we can learn from examining *PMBOK*'s 10 Knowledge Areas and how they relate to tech comm, there's one other similarity between these two fields: certification. In the world of project management, this is huge. Many leaders in the industry believe certification is highly relevant for mid-career project managers; if that sounds a bit familiar to you in the tech comm world, it's no surprise. STC provides certification too, and as the program grows it becomes more crucial to success within our industry. For those who are new to mid-level in tech comm, STC certification is an ideal to pursue. In both cases, certification offers independent proof that you have a clear grasp on the fundamentals of the profession.

In Summary

Best practices from the field of project management offer great insight into ways technical communicators can improve what we do, and how we do it. The overlap that exists between the two fields makes it easier for technical communicators to recognize the value of those best practices in our day-to-day work.

One thing that you likely noticed about *PMBOK's* key Knowledge Areas is the overlap that also exists between them. Some are so intertwined that one cannot realistically be effective without the other. It's easy to

understand, for example, the value of procurement management when you realize the impact it has on cost and time management. You likely already pursue at least some of these best practices in your own workplace; ideally, we as technical communicators will find even more ways to leverage these techniques for success. In addition to *PMBOK*'s 10 key Knowledge Areas, its elevation of certification credentials is something we can draw from as an example of how to advance the profession of technical communication.

Just like the fundamentals of sports are transferable (an athlete who is fit, versed in the rules of the game, has good hand-eye coordination, knows the positions of the other players, and plays well on a team with others can likely find a core of success regardless of the sport), so too are the fundamentals of technical communication and project management. The more we learn about how others who are part of our team think and act, the easier it is for us to adjust what we do to help them succeed. As we see what drives their success, we can apply it to our own position on the team. Managers of projects, managers of documentation. Writers of project plans, writers of documentation plans. Successful implementation means developing our skills, following core rules, and building trust with our teammates. Let's get in the game!

BERNARD ASCHWANDEN *(bernard.aschwanden @publishingsmarter.com) solves documentation-based problems and helps companies generate more revenue. He guides clients through the best processes to create, manage, and deliver content, and has helped hundreds of companies implement successful solutions. He is focused on publishing better, publishing faster, and publishing smarter. Bernard is the founder of Publishing Smarter, and is an Associate Fellow of STC, and a Past President of STC.*

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2021 Summit Sneak Peek

Registration is Open Now!

STC IS EXCITED to offer a virtual conference again this year to meet the ongoing educational needs of technical communication professionals across multiple time zones and to protect the wellbeing of attendees.

This year's Summit will feature live and simulive education sessions, preconference workshops, vendor showcases, networking opportunities, and entertainment and social events. The wide range of sessions offered at this year's event will focus on one of the following areas: Content Design and Delivery; Tools and Technologies; and Management, Leadership, and Career Development.

5-9 June 2021
Entirely online!
Visit **summit.stc.org**

GENERAL SCHEDULE

Note: All times are Eastern Time (ET)

Saturday, 5 June 2021

9:00 AM-6:00 PM
Full- and half-day Preconference Workshops (separate registration fees)

Sunday, 6 June 2021

9:00 AM-6:00 PM
Full- and half-day Preconference Workshops (separate registration fees)

Monday, 7 June 2021

9:00 AM-6:00 PM
Expo Open

9:00 AM-11:45 AM
Education Sessions

12:00 PM-12:45 PM
Featured Speaker

1:15 PM-2:00 PM
Virtual Speed Networking

2:00-2:45 PM
Featured Speaker

3:00-4:45 PM
Featured Speaker

4:45-6:00PM
Entertainment and Networking

Tuesday, 8 June 2021

9:00 AM-6:00 PM
Expo Open

9:00 AM-11:45 AM
Education Sessions

12:00 PM-12:45 PM
Featured Speaker

1:15 PM-2:00 PM
STC Honors Event

2:00-2:45 PM
Featured Speaker

3:00-4:45 PM
Featured Speaker

4:45-6:00PM
Entertainment and Networking

Wednesday, 9 June 2021

9:00 AM-6:00 PM
Expo Open

9:00 AM-11:45 AM
Education Sessions

12:00 PM-12:45 PM
Featured Speaker

12:45-1:30 PM
Break

1:30 PM-2:15 PM
Featured Speaker

2:30 PM-4:15 PM
Education Sessions

4:15 PM-5:00 PM
Closing Celebration

See the full schedule with speakers and session descriptions at summit.stc.org.

UPCOMING WEBINARS

How to Share Authoring Solutions That Work

Speaker: Ken Schatzke
Wednesday, 5 May 2021
1:00 to 2:00 PM Eastern time (GMT-4)

This webinar will demonstrate how to implement a five-step process for implementing an authoring solution developed for a technical communications teams to other teams across an organization.

The five steps in the process are:

1. Research your customers
2. Research your team's authoring solution
3. Reach out to other teams
4. Roll out a pilot project to test the authoring solution's applicability to other teams' content
5. Roll out the authoring solution to the other teams based on findings from the pilot project

Throughout the webinar, Ken will provide tools and techniques for business analysis and explain how rolling out an authoring solution to other teams can raise the profile of a technical communications team within an organization and allow it to grow its influence beyond traditional technical communication deliverables like manuals, online help, and release notes.

Register now at **www.stc.org/event/authoring-solutions-that-work-050521**

Information Design Basics: It's Not Just the Words!

Speaker: Linda Oestreich
Wednesday, 14 July 2021
1:00 to 2:00 PM Eastern time (GMT-4)

This webinar offers information on why it's more than the words on the page that contribute to good communication. Information design can be part of every technical communicator's toolbox and you don't need to be a designer to make a difference. Based on Robin Williams' book, The Non-Designer's Design Book, this webinar gives the attendees some basic tricks and tips for ensuring information is well-presented, organized in readable fashion, and pleasant to the eye.

Takeaways include the following:

- Understanding what information design is
- Learning how to make some small changes that can impact the message in big way
- Getting resources to learn more on your own to ensure that you're creating better-than-good websites, documents, and materials.

Register at **www.stc.org/event/design-basics-webinar-2021/**

Highlight Your Career on STC's *Notebook*

STC'S *NOTEBOOK* BLOG serves an important role of keeping the STC community updated on Society news and events as well as sharing industry news and insight from STC members.

An upcoming initiative will be to feature brief member profiles on the *Notebook*, highlighting the many different facets of a career in technical communication. STC will prepare the content, but is seeking participants to be highlighted.

If you would like to participate, please contact **publications@stc.org.**

Content Technologies: Managing Content is a Team Sport

Keep an eye on the big picture with project management for content

BY CRUCE SAUNDERS

MANAGING CONTENT PROJECTS takes teamwork, because content lives in a much wider world than just the words and pictures that comprise the basic matter of content itself.

Project management traditionally helps move a product or output from inception to completion and delivery. Often, all the inputs to the project are within the control of the project team. Their efforts are able to live within a finite department or function.

Content can—and is often—produced in such a finite, closed-loop way. Applying this closed-loop approach to content results in a linear process that delivers a content artifact, usually in the same static form, manually added across multiple channels. With traditional project management and the dated conception of content as single-form artwork, content becomes a product that is a finite output memorialized into an artifact form.

To achieve successful omnichannel delivery and relevance for content across multiple consumer types and contexts in today's market, we need a whole new approach to content project management.

Teams are finding they must collaborate vertically and horizontally across the enterprise because they need to build content components connected and integrated with the larger ecosystem (of which they are part). Therefore, smart teams on the leading edge of change are actively implementing an organizational structure that supports content primed to be used as part of intelligent customer experiences (decoupled content that is "customer journey-ready").

As customer interaction and customer journeys change, managers and executives find themselves facing the need to totally change the way they equip and train teams. They are modifying content supply chains, reimagining architectures, and shifting how communications flow internally within the organization.

Let's start with why this change is so important, then we'll cover ways some teams are adapting.

Publishers face many challenges creating a new operating model and orchestration approach for dynamic omnichannel content. This column addresses the changing content ecosystem and the evolving dynamics in the space. Questions, suggestions, or feedback? Email *editorial@simplea.com.*

Content Never Lives in a Vacuum

The customer journey can start at almost any touchpoint with an enterprise's outward-facing content. With honor to Mark Baker, "any touchpoint is touchpoint one." And, users move from one customer experience (CX) to another. Customers choose. Customers control. Customers lead.

Customers inherently connect across disciplines and functions within an organization. But today, those connections mostly happen by messy accident. It is time to build content which responds to customer sentiment and intent, based on patterns.

In order to meet the needs of the full context that customers bring to the content, we need to realize that customer experience is never siloed. We are always bringing customers from one experience to the next. Customers always come *from* somewhere and go *to* somewhere else, abandon the content, or take some action.

So, we have to look at what **context** brings to interaction with the content. We need to reexamine the process of building content, treating it as cross-functional, channel-agnostic or channel-ready, and multipurpose it. How does our content relate with different producers of an omnichannel publishing stack? Various creative, technical, and strategy stakeholders all contribute to content. Orchestrating even simple customer experiences takes teamwork. The more channels, the more complex the enterprise, the more teamwork and process it takes to manage. Content performs valuable work when primed and ready to do that work.

In addition, there is a vertical stack to consider. For instance, modular content needs to work with modular design systems and interface patterns. We need to collaborate both horizontally and vertically within an organization to produce content assets that make sense as part of a *holistic* customer journey. Successful content projects don't just manage the delivery of a content artifact. They must manage the delivery of integrated knowledge and customer experiences. That is, knowledge is expressed in content.

[A] recommends that authoring teams also work within the cross-functional content organization that we call the content services organization (CSO). The CSO helps to connect these horizontal and vertical worlds.

Horizontally, the CSO can be established to work across functional teams and business units. Vertically, the CSO can work across the whole CX stack: stakeholders, developers, and designers. Modular content needs to work with modular design systems and interface patterns—not just single artifacts. Shared patterns enabled by the CSO create vertical stack alignment and horizontal functional alignment.

Content lives at the intersection of customer experience, so we need to orient the operations of that content at the intersections, making sure that knowledge is able to flow into content assets of varying types, and fit into the bigger strategic picture of the organization.

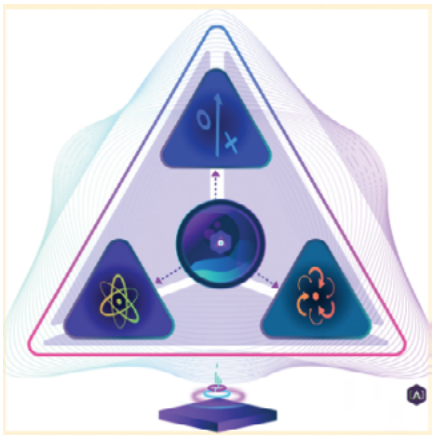
Content Supply Chain

Content in motion is content that matters. All content ROI emerges from motion: content that flows between producers, humans, or robots. This law of content motion applies internally within content workflows as well as externally, when content is published for consumption within customer experiences.

The path of systems content that moves along during authoring, enrichment, management, and delivery of content is the content supply chain. Everything in a content supply chain is subject to friction as content gets transformed from state to state. The combination of automated and manual transformation processes in a content supply chain largely dictates the throughput and velocity of that content. Therefore, building content supply chains with intention builds the future of customer experience.

Empowering Collaboration via Content Services Organization (CSO)

[A] proposes a new solution: within the context of a content orchestration model (COM), form a chartered content services organization (CSO) and empower it with durable leadership in the form of three major practices: content strategy, content engineering, and content operations.



As the demand for more relevant content interactions across platforms grows by the day, publishers are moving toward producing much smaller units of content that can be recombined. Accomplishing this environment of content intelligence, [A] believes, involves these three separate practices:

- **Content Strategy**
  Content strategy organizes the vision for customer experience and establishes the business justification for investments to be made in improving how content is handled. This involves defining the necessary metrics that will be used to measure progress against the plan.
- **Content Engineering**
  Content engineering makes sure that correct practices, platforms, and technologies are in place to take the content strategy from plan to a technically realized reality as a resource to development teams. Content engineers hold the keys that unlock the gates that both separate very talented and often isolated members of a content team, as well as the full potential of what the team can accomplish.
- **Content Operations**
  Content operations performs the day-to-day business of acquiring, managing, and leveraging content. Content operations facilitates the interactions throughout the content supply chain, implements systems that meet strategic goals, and manages all content production workflows that take place when applying content structural and semantic standards to governance frameworks. These standards include the Core Content Model® and centralized semantic annotation, terminology, and tagging standards.

The Strategic Role of Content Operations

Content operations provides a foundation for the intelligent content experience and has dedicated staff to make sure that all aspects of content coordination work smoothly and are scalable. Improving throughput of content supply chains, content operations ensures adherence to an organization's overall content orchestration model. The content orchestration model lays the groundwork for a new way of working with the knowledge assets within an enterprise. They can become part of an integrated whole, paired in a service-oriented environment with the rest of the enterprise and external partners and customers. It takes real orchestration, and that requires discovery and strategy before it happens.

Content operations collaborates with both content strategy and content engineering to make an organization's vision real. Working with content strategy, content ops helps create processes and solutions to best serve business goals. With engineering, content ops ensures the systems and infrastructure support an efficient content supply chain. The ultimate result? Healthy internal rhythms and workflows, and customers rewarded with intuitive and seamless content interactions.

A simple way to understand content operations is to think of it as the chief operating officer (COO) of the enterprise's content. Content operations creates and manages the frameworks that empower content strategy to work more seamlessly with content engineering. It benefits stakeholders across teams and departments by improving efficiencies and communications.

When the content frameworks and processes function well, teams can be more effective and efficient in their work, which not only saves costs, but also improves time to market, builds customer engagement, and improves the overall customer experience.

A New Approach to Content Project Management

Working within the guidance of a CSO, content creators can make content that is modular, intelligent, and primed for self-assembly that responds to customer needs and intent. The goal of self-serviced content is for customers to be presented with the next best step in their decision-making process or customer journey.

Content operations can ensure that strategy and engineering work together in sync to ensure a friction-free experience for internal stakeholders and customers alike. Operations does this through the orchestration of shared patterns (the Core Content Model®, the Core Semantic Model®) across authoring tools, systems, and processes—ensuring content can work as one whole born out of many parts across the organization.

To learn more about the content orchestration model and the Conference Services Organization, download the white paper on simplea.com or check out the new YouTube series from [A], "The Invisible World of Content."

Controlling the Chaos

BY MICHELLE CORBIN | *STC Fellow*

EARLY IN MY career, I became maniacal about time management. I took a five-day course on Stephen Covey's *7 Habits of Highly Effective People*, where I wrote my first personal mission statement and where I learned the foundations of good project management. Of course, my next bible became JoAnn Hackos' *Managing Your Documentation Projects* (which expanded to be much broader in scope: *Information Development: Managing your Documentation Projects, Portfolio, and People*). In this column, I'll summarize the key principles of my own maniacal time management system that has effectively and efficiently guided me throughout my now 30-year career as a technical communicator and technical editor.

How to Be Effective

To be an effective technical communicator, I have cultivated these two habits (which are based on two of Covey's *7 Habits*):

- Proactivity
- Prioritization

Be Proactive

Habit 1 of the *7 Habits* is "Be Proactive." Being proactive means having "the initiative and the responsibility to make things happen" (p. 71). We must act instead of being acted upon by others, by our environment, or by things outside of our control. Where we choose to focus our time and energy dictates how proactive we can be. We have to become aware of what we have control over. When editing, what is our circle of influence? We need to focus our time and energy within that circle only, instead of the much broader circle of concern.

From a time management perspective—specifically a productivity perspective—we have to apply Covey's P/PC balance principle (p. 54). We must balance our own production (P) with our own production capability (PC). (Chad Carson wrote a great blog summarizing this principle; see References.) Without this balance, we quickly lose our effectiveness. To take action—and be proactive—we have to understand what we can influence and what we are capable of.

Prioritize, Plan, and Preview

Habit 3 of the *7 Habits* is "Put First Things First." Covey summarizes years of time management research into this simple phrase: "Organize and execute around priorities" (p. 149). He presents a time management matrix, which instead of focusing on things and time, focuses relationships and results, which ultimately helps to maintain the P/PC balance (p. 150). This matrix categorizes activities across two axes: Importance and Urgency (p. 150-156).

These four quadrants work their magic in these two ways:

1. They allow us to easily prioritize our activities. Covey encourages that we spend most of our time in Quadrant II: Important, but not Urgent. Quadrant II focuses on prevention and preparation.
2. They enable us to say the magic word: No. To be able to focus on Quadrant II activities, you have to say no to non-important activities and sometimes even say no to urgent important activities. Still, you get to say no.

The best way to spend most of your time in Quadrant II activities is to first and foremost plan your week. Then, do a daily preview of the following day based on how your

day went, and adjust the weekly plan based on your priorities. Prioritize, plan, and preview; wash, rinse, and repeat.

How to Be Efficient

To be an efficient technical communicator, I have cultivated these three habits (which were formed from applying Hackos' project management principles):

- Set objectives and goals
- Track your time
- Report your results

Set Objectives and Goals

Before you embark on any project, you need to know the goals and objectives of your company, your organization, your team, and yourself. To effectively manage your time, and prioritize your activities, you have to have a clearly documented set of objectives and goals. All of your decisions and prioritizations should be based on this predefined list of goals and objectives.

Track Your Time

As your team sets about creating the project plan and project schedule, they start to seek out standard productivity metrics. Hackos certainly presented some for information development projects, and Carolyn Rude includes some in her *Technical Editing* textbook for editing activities, and you can even find some from a quick Google search (see Jean Hollis Weber's take or David McClintock's interesting words per hour (WPH) benchmarking; both are listed in References).

These standard metrics are at least a good starting point, but you can improve the effectiveness and efficiencies by tracking your own time and identifying your own productivity metrics. Your team and your organization are going to have a different set of priorities, processes, tools, and dependencies that just won't be represented in the standard metrics.

Creating and using a personal time tracking spreadsheet can allow you to estimate how much time you think an activity will take, and then document the actual amount of time that you took along with the dependencies and impacts for the activity. This is a skill that is particularly crucial to freelance editors, as it helps to understand if you are pricing your projects appropriately.

Report Your Results

Make sure that you put that data to good use. Report on the results "up the line" (to your manager, to your team, and to your organization). These results will help you set goals and objectives for the next iteration or version. They'll also help you improve your estimates and project schedules, because they'll be based on the most contextualized, more accurate actual data for your production and production capability.

Efficiency and Effectiveness

Many of my colleagues are amazed at everything that I can accomplish in my eight hours each day. That's because I am proactive whenever and wherever possible, I prioritize and plan and preview my activities constantly, and I track my time daily.

Peter Drucker, a management consultant, is quoted as saying, "Efficiency is doing things right. Effectiveness is doing the right things." The best way to control the chaos inherent in our technical communication projects is with project and time management principles. Covey's *7 Habits* and Hackos' project management principles can help you focus on doing the right things all while doing things right. i

In Editing Matters, Michelle Corbin covers matters (topics) about editing that matter (are of consequence) to communicators of all kinds. Watch this space to understand more about editing and what you can do to improve the quality of your content. To suggest a topic or ask a question, contact Michelle at *michelle.l.corbin@gmail.com*.

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Ask a Tech Comm Manager

BY CINDY CURRIE | *STC Fellow*
AND KIT BROWN-HOEKSTRA | *STC Fellow*

DEAR STC COMMUNITY,

We have enjoyed answering your questions over the past five years, and the time has come to bid you adieu. We look forward to the new column that will fill this space, and to the interesting topics each issue will cover under Alisa Bonsignore's expert guidance. We are, of course, always happy to mentor people and to provide assistance. We can be reached via social media and email. Keep us posted on your careers and your dreams.

In honor of this month's theme of project management, we have compiled a final set of questions and answers.

We are currently using Agile for our product and content development. Now, we need to bring in our localization process to the mix, so that we can do more continuous delivery. What do we need to do?

Excellent! Pulling localization upstream in the process helps you to better manage global, simultaneous shipments and improve customer experience. Before adding your localization process to the Agile mix, talk to your localization vendor and explain what you are wanting to do. They can help you identify roadblocks, opportunities, and tool/process changes you need to make before going Agile.

If you are already doing structured content and using a CMS, all the better. It makes it easier to parse the content to send to localization in batches. Initially, it's best to plan a sprint +2 cycle, so that the product features and content are stable before sending to localization (sending too early is likely to blow your localization budget with rework). Also, identify which content tends to be the most stable and batch that first.

This is a good time to audit your source content for localization issues and establish priorities for improving its global readiness. Often, small content or process changes in the source can have a huge impact on localization. This is particularly true in the realms of change management, quality assurance, and terminology management (there's too much to go into in this short space, but there are workshops on these topics). As an example, if you have an error in the source that costs $50 USD to fix and that content has already been localized, multiply that cost by the number of languages and that total by the number of changes. ($50 USD x 20 languages = $1,000 USD for ONE change. Now, if you have 30 places where that problem occurs and the change needs to be made manually, it will cost you $30,000 USD.) You can see how quickly costs can add up.

Dominique Trouche from WhP and Kit Brown-Hoekstra presented on this topic at the 2020 STC Summit, and the WhP blog provides more tips on a variety of localization topics: **www.whp.net/en/category/blog-en/.**

We are a small project team working in a small company with mission-critical deadlines. How can we mitigate the risks of losing a project team member at a critical point in the process?

Managing risk is one of the biggest challenges in project management, and it's particularly challenging in the midst of a global pandemic. Here are some recommendations:

- To the extent possible, allow people to work from home and ensure your workplace follows the CDC COVID-19 workplace guidelines.
- Cross-train team members, and identify experienced contractors or other employees who can backfill in case of an emergency.
- Keep all project communication in a centralized area that everyone on the team has access to. If possible, record conference calls and use Slack or other communication channels to capture casual questions, discussions, and other communications in a centralized, searchable way.
- Train more junior team members so they can handle tasks independently.
- Communicate proactively with each other. Make sure everyone on the team has each other's contact information. No news is *not* good news when working virtually, especially during a pandemic.
- Plan extra time in the schedule when you can, and recognize that everyone on the team is dealing with extra demands both at home and at work right now.
- Pace yourselves. There are very few real content emergencies. Most teams that work tons of overtime all the time have high levels of burnout and turnover. If people are consistently working 50-60 hours a week, it's an indication that you need to hire people, or that your processes are inefficient. Fix the easy stuff, and schedule time to evaluate and update systems and processes to improve efficiencies.
- Treat people well.
- Set clear expectations, guidelines, roles/responsibilities, and deadlines.
- If possible, ensure everyone has a backup person who can step in if needed.

Ask a Tech Comm Manager is an advice column geared toward answering all those questions you have, but might be uncomfortable asking. We glean the questions from social media, forums, and most importantly, from you, dear reader.

Read *STC's Notebook*

The official blog of the Society for Technical Communication, *STC's Notebook,* is your source for STC news and insight from the STC community.

Visit *www.stc.org/notebook*

Contribute to the *Notebook!*
Send your submissions to *publications@stc.org*.

For most of us, mid-March 2020 was when everything changed. It seemed fitting to mark the end of our first year of pandemic life with a bit of reflection and acknowledgement about how many things have changed. While we clearly learned a lot, many are skills that we hope never to have to use again once things are back to normal.

We asked our technical communication colleagues:

What is a skill that you learned during the pandemic that you never would have anticipated?

> Does reassessing my whole life and moving halfway across the country count? Also, I learned about asserting my boundaries, started writing fiction again, and became a *Just Dance* expert.

> I've been the designated barber for everyone in my family. Being a perfectionist and not trained in this skill has been exhausting. Sometimes all I can focus on are the glaring mistakes on their heads, and not the conversation!

> I've been cutting my husband's hair, then apologizing to him.

> My grand plan was to start a podcast. I recorded two episodes and never posted them because editing was more trouble than it was worth.

> My new superpower is that I can tell if a mask will fit just by glancing at the online listing.

> Being a teacher's assistant for kindergarten.

> I learned a bunch of new board games, how to use Miro for online workshops, and how to back up an RV. What I never want to do again: I broke my ankle, re-injured it, and had surgery and I'm also learning how to navigate hospice for a loved one.

> I learned how to use wood stain to refresh a kids' outdoor play set.

> I jumped on the sourdough bread bandwagon early on. It was great until about July when I forgot to feed my starter. I still don't understand how I forgot. It's not like I went on vacation and left it unattended; I was just distracted.

> I learned how to use a power saw for the first time (a compound miter saw, specifically).

> Reading! I'm always reading! Mostly because my brain is mushy after I've finished a day of work and remote-learning supervision and keeping everyone fed. Nothing sticks in my brain and I just read the same paragraph over and over.

> Does painting a room count as a skill? I knew how to do that already, but I repainted one room, which made me realize that the next room looked terrible, and then I had to keep going. I'm much better at it now because I have a system. I also realized that I hate painting and hope not to have to do it again for at least another decade.

> I've never been a good cook, so I decided to try to perfect a handful of recipes. It sounds more exciting than it was. I basically kept eating the same thing over and over until I got it right, and then meticulously annotated the recipes so I wouldn't forget. So far, I've gotten fairly good at eggs, steak, and cacio e pepe pasta, and I'm still working on successfully roasting a chicken.

> I've learned how to navigate elder care and insurance companies from a distance. It's the worst skill I've ever had to learn.

Here's hoping that we'll soon return to some form of normalcy and will be able to share our stories in person at a Summit or local meetup!

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STC Summit Pre-Conference Courses (half day)	3
STC Annual Summit	8
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